



P.O. Box 4186
San Rafael
California 94913-4186

Phone: 415/499-6570
Fax: 415/499-3799

www.marintraffic.org

Belvedere
Jerry Butler

Corte Madera
Melissa Gill

Fairfax
Lew Tremaine

Larkspur
Joan Lundstrom

Mill Valley
Dick Swanson

Novato
Pat Eklund

Ross
Jeanne Barr

San Anselmo
Peter Breen

San Rafael
Al Boro

Sausalito
Amy Belser

Tiburon
Alice Fredericks

County of Marin
Susan Adams
Hal Brown
Steve Kinsey
Charles McGlashan
Cynthia Murray

July 28, 2005

TO: Transportation Authority of Marin Commissioners

RE: Accept MTC's Offer of Delegation for the Lifeline Transportation Program Agenda Item 5.e

Dear Commissioners:

The Metropolitan Transportation Commission (MTC) has offered delegation of oversight of the Lifeline Transportation Program to all Bay Area Congestion Management Agencies (CMAs) for a minimum of three years (FY 2005/06 through FY 2007/08). Additional information on the Lifeline Program is attached to this staff report.

The Lifeline Transportation Program would be a funding source for projects identified through the Community Based Transportation Plans (CBTP) to be completed for the Canal neighborhood in San Rafael and Marin City. These CBTPs, funded by MTC, are expected to be completed next year.

MTC asks that TAM provide written documentation of acceptance of the Lifeline Program and identification of a lead staff person for the program. No additional funding for TAM's administration of this program has been identified by MTC. It is staff's opinion that the current level of MTC funding for CMA Planning Activities is sufficient to accommodate the current workload, without adding the increased workload associated with administering the Lifeline Program. Further review of funding workload is necessary between the CMA's and MTC. CMA funding is provided in 3-year agreements. The next agreement will be for the period starting July 1, 2006.

Recommendation

Staff recommends that the Commission direct the Executive Director to: 1) Send a letter accepting the Lifeline Program delegation offer by MTC; 2) Review workload associated with delegation acceptance; and, 3) Work with other CMAs and MTC staff to determine an appropriate level of CMA Planning Activities funding, in relation to CMA activities.

Respectfully Submitted,

Craig Tackabery
Executive Director

Attachment: Attachment A, MTC Resolution 3699

Making the Most of Marin County Transportation Dollars

Lifeline Transportation Program Guideline

GUIDING PRINCIPLES FOR COUNTY LIFELINE PROGRAMS FY 2005-06 through FY 2007-08

Program Goals: The county programs are established to fund projects that result in improved mobility for low-income residents of the nine San Francisco Bay Area counties, and are expected to carry out the following regional Lifeline Program goals:

The Lifeline Program supports community-based transportation projects that:

- Are developed through a collaborative and inclusive planning process that includes broad partnerships among a variety of stakeholders such as public agencies, transit operators, community-based organizations and other community stakeholders, and outreach to underrepresented stakeholders.
- Address transportation gaps and/or barriers identified through a Community-Based Transportation Plan (CBTP), countywide or regional Welfare-to-Work Transportation Plan, or are otherwise based on a documented assessment of needs within the designated communities of concern. Findings emerging from one or more CBTPs may also be applied to other low-income areas, or otherwise be directed to serve low-income constituencies within the county, as applicable.
- Improve a range of transportation choices by adding a variety of new or expanded services including but not limited to: enhanced fixed route transit services, shuttles, children's programs, taxi voucher programs, improved access to autos, capital improvement projects. Transportation needs specific to elderly and disabled residents of low-income communities may also be considered when funding projects.

Program Administration: MTC recommends the Lifeline Program be administered by the Congestion Management Agencies (CMAs)¹ for a minimum of three years (FY 2005-06 through FY 2007-08). At a CMA's discretion, and with concurrence by MTC, a countywide entity other

¹ Alameda County Congestion Management Agency
Contra Costa County Congestion Management Agency
San Francisco County Transportation Authority
Marin County TAM
Napa County Transportation Planning Agency
San Mateo City-County Association of Governments
Santa Clara Valley Transportation Authority
Sonoma County Transportation Authority
Solano Transportation Authority

than or in addition to the CMA may administer the program. That entity must either be an eligible recipient of respective Lifeline Transportation fund sources, or capable of serving as fiscal agent to administer program funds, and otherwise meet program expectations as described in these program guidelines.

MTC requests receipt of written documentation no later than September 30, 2005 from the CMA governing board either agreeing to the terms outlined in the guidelines for administering the program, or identification of another countywide entity recommended to administer the program in lieu of the CMA. That countywide entity will likewise submit notification to MTC of its interest and willingness to administer the program consistent with these guidelines, for the Commission's consideration and approval. Absent this documentation, MTC will hold the county's lifeline funding in reserve until such time a local agreement is reached.

Prior to completion of the three-year period MTC, in consultation with CMAs or other project administrators and other program stakeholders, will conduct an evaluation to assess program results, and to recommend a long-term strategy for administration of the Lifeline Program.

All interim lifeline funds will be available for direct services, and not used to cover costs that may be incurred by the CMAs or other countywide agency in administering this program.

Multi-Year Programming: A one-time multi-year programming cycle will be conducted to select eligible lifeline transportation projects.

Competitive Process: For the county programs, funds must not be allocated by formula to sub-areas within the county. Projects must be selected consistent with the findings of a CBTP, countywide regional welfare-to-work plan or other documented assessment of needs within the designated communities of concern. Where plans have not been completed, projects will be selected through an open, competitive process in order to fund those projects that best exemplify the program principles and result in the greatest community benefit.

Grant Application: To ensure a streamlined application process for sponsors, a universal application form (or standard format and content for project proposals) will be developed jointly by MTC and CMA staff, but may be modified as appropriate by the CMAs or countywide administering agency for inclusion of county-specific grant requirements. The "call for projects" for the county programs should be coordinated as closely as possible.

Program Match: A local match of a minimum of 20% of the total program cost is required; new Lifeline Transportation Program funds may cover a maximum of 80% of the total project cost. Project sponsors may use other local funding sources (Transportation Development Act, operator controlled State Transit Assistance, local sales tax revenue, etc.) to meet the minimum 20% matching fund requirement. In addition, the required match can include other *non*-Department of Transportation (DOT) federal funds. Eligible sources of non-DOT federal funds include: Temporary Assistance to Needy Families (TANF), Community Services Block Grants (CSBG) and Social Services Block Grants (SSBG) administered by the US Department of Health and

Human Services, Community Development Block grants (CDBG) and HOPE VI grants administered by the US Department of Housing and Urban Development (HUD). Grant funds from private foundations may also be used to meet the match requirement, and in-kind costs associated with oversight of the project may also be considered to meet the match requirement.

Evaluation Criteria: Standard evaluation criteria will be jointly developed by MTC and CMA (or other countywide administering agency) staff for use in selecting projects. Additional criteria may be added to the county program but should not replace or supplant the regional criteria. MTC staff will review the proposed county program criteria to ensure consistency and to facilitate coordination among county programs.

Project Selection/Draft Program of Projects: The CMAs (or other countywide administering agency) shall provide an opportunity for outside interests and organizations (e.g., local department of social services, transit agencies and other transportation service providers, local community-based organizations, etc.) to assist in developing and/or to comment on a proposed list of projects to fund. A list of participants in the CBTP processes or other prior lifeline related activities will be provided to the project administrator for their consideration.

In funding projects, preference will be given to strategies emerging from the local CBTP process, if completed, or from a countywide regional welfare-to-work or other documented assessment of need within the designated communities of concern. Regional lifeline funds should not supplant or replace existing sources of funds. Lifeline funds may be used for either capital or operating purposes. Eligible operating projects, consistent with requirements of funding sources, may include (but are not necessarily limited to) new or enhanced fixed route transit services, restoration of lifeline-related transit services eliminated due to budget shortfalls, shuttles, children's programs, taxi voucher programs, improved access to autos, etc. Inter-county projects may also be funded, if two or more counties wish to jointly plan for and fund such a project. CMA or countywide administering agency will consider the project sponsor's ability to sustain ongoing funding beyond the initial grant funding.

Capital projects that do not require ongoing funding are encouraged. Examples of eligible capital projects include (but are not necessarily limited to) purchase of vehicles, provision of bus shelters, benches, lighting, sidewalk improvements or other enhancements to improve transportation access for residents of low-income communities.

Transportation needs specific to elderly and disabled residents of low-income communities may also be considered when funding new programs.

Funding: Funding amounts will be assigned to each county, based on the distribution outlined in Table A. MTC will confirm project/applicant eligibility, and assign appropriate fund source for each project. If CMAQ (or JARC) funds are used, MTC will program the project into the TIP. If STA funds are used, MTC will either allocate funds directly to transit agency or other eligible entity, as applicable, or will enter into a funding agreement with the CMA or other countywide

administering entity for transfer of the funds to the project sponsor through a funding agreement. Projects funded must meet the eligibility requirements of the respective source of funds.

Project Delivery: All projects funded under the county programs will be subject to MTC obligation deadlines and project delivery requirements. All projects will be subject to a “use it or lose it” policy. Should there be a balance of non-programmed lifeline funds from a county’s fund share after conducting the call for project/project selection process, an equivalent amount of funds would be reserved for the respective county for reprogramming to other Lifeline related investments at a future date.

Policy Board Adoption: Projects recommended for funding must be submitted to and approved by the respective governing board. The appropriate governing board shall resolve that approved projects not only exemplify Lifeline Program goals, but that the local project sponsors understand and agree to meeting all project delivery and funding match and obligation deadlines.

Project Oversight: The CMAs or equivalent countywide agency will be responsible for oversight of projects funded under the county programs and ensuring projects meet MTC obligation deadlines and project delivery requirements. In addition, the CMA or other administering entity will ensure, at a minimum, that projects substantially carry out the scope described in the grant applications. All scope changes must be fully explained and must demonstrate consistency with Lifeline Program goals.

CMAs or other program administrators are responsible for programmatic and fiscal oversight of new lifeline projects. As part of the Call for Projects, applicants will be asked to establish project goals, and to identify basic performance indicators to be collected in order to measure the effectiveness of the program projects. At a minimum, performance measures for service-related projects would include: documentation of new “units” of service provided with the funding (e.g. number of trips, service hours, workshops held, car loans provided, etc.), cost per unit of service, and a quantitative summary of service delivery procedures employed for the project. For capital-related projects, project sponsor is responsible to establish milestones and report on the status of project delivery.

Program Evaluation: MTC, in consultation with CMAs or other countywide program administrator will conduct a program evaluation to report on the results of the program, and to recommend future funding and programmatic oversight for the \$216 million dedicated to the program as part of the Transportation 2030 Plan. The cost to administer the program will be considered as part of the program evaluation to be conducted upon completion of the three-year cycle.

TABLE A			
County	% Bay Area poverty population*	Estimated (minimal) funding FY 2005-06 through FY 2007-08**	
		Annual	3 Year
Alameda	27.4%	1,370,000	4,110,000
Contra Costa	12.5%	625,000	1,875,000
Marin	2.7%	135,000	405,000
Napa	1.7%	85,000	255,000
San Francisco	15.1%	755,000	2,265,000
San Mateo	7.1%	355,000	1,065,000
Santa Clara	21.7%	1,085,000	3,255,000
Solano	5.5%	275,000	825,000
Sonoma	6.3%	315,000	945,000
TOTAL	100%	\$5,000,000	\$15,000,000

* Based on federal poverty levels reported in 2000 US Census data